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# **Lineages of the Islamic State: An International Historical Sociology of State (De-)Formation in Iraq**

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## **Abstract**

Existing accounts of the Islamic State (IS) tend to rely on orientalist and technicist assumptions and hence insufficiently sensitive to the historical, sociological, and international conditions of the possibility of IS. The present article provides an alternative account through a conjunctural analysis that is anchored in an international historical sociology of modern Iraq informed by Leon Trotsky's idea of 'uneven and combined development'. It foregrounds the concatenation of Iraq's contradictory (post-)colonial nation-state formation with the neoliberal conjuncture of 1990-2014. It shows that the former process involved the tension-prone fusion of governing institutions of the modern state and the intermittent but steady reproduction, valorization, and politicization of supra-national (religious-sectarian) and sub-national (ethno-tribal) collective identities, which subverted the emergence of an Iraqi nation. The international sanctions regime of the 1990s transformed sectarian and tribal *difference* into sectarian-tribal *tension* by fatally undermining the integrative efficacy of the Ba'ath party's authoritarian welfare-state. Concurrently, the neo-liberal demolition of the post-colonial authoritarian welfare states in the region gave rise to the Arab Spring revolutions. The Arab Spring however elicited a successful authoritarian counter-revolution that eliminated secular-nationalist forms of oppositional politics. This illiberal neoliberalisation of the region's political economy valorised the religionisation of the domestic effects of the 2003 US-led destruction of the Iraqi state and its reconstruction on a majoritarian basis, which favoured the Shi'as and transformed sectarian tension into sectarian *conflict* culminating in IS.

## **1. INTRODUCTION<sup>1</sup>**

In a spectacular blitzkrieg in June 2014 the Islamic State of Iraq and Syria (ISIS) captured Mosul, Iraq's second city, and large swaths of territory in northern and western Iraq. ISIS then renamed itself the Islamic State (IS) and declared a caliphate.<sup>2</sup> Initially this new entity controlled a territory stretching from north-western Syria to central Iraq nearly the size of Britain and ruled over a population larger than Denmark's. Since then IS has suffered important territorial losses in Iraq and Syria in apparent retaliation for which it has conducted multiple terrorist attacks in Turkey and Europe. At the time of writing IS has militarily been largely defeated by a US-led coalition of more than fifty countries and an array of local non-state actors notably Kurdish and Shi'a militias, and, to a relatively lesser extent, militaries of Syria, Iran, and Russia (Drennan, 2014). However, for several years IS's territorialised rule, strong revenue, large-scale attraction of foreign fighters, and strategic use of spectacles of death and extreme violence had turned it into the world's most potent jihadi force which continues to enjoy support both in the region and beyond.

## How can we explain the meteoric rise of IS?

There has been no shortage of answers. One IS bibliography is already 48 pages long (Tinnes, 2015). However, given the recentness of the phenomenon most of these have the form of commentary or policy-briefs. Moreover, many of the more substantive existing accounts operate within mainstream security and terrorism studies paradigm reproducing its technisist bias, which narrowly focuses on organisational and logistical matters, and inherent problems of 'racism and Islamophobia [and] an inability to think beyond the worldview of the national security state' (Li, 2015: 12). Theoretically, implicit in many of these accounts is the assumption that IS is an extreme iteration of the wider phenomenon of political Islam itself seen as an untheorisable developmental anomaly; a pathological deviation from classical social theory's 'secular' and 'rational' *Weltanschauung*.<sup>3</sup> This purported deviation is explained in terms of the orientalist thesis regarding the inherent fusion of religion and state in Islam (e.g. Lewis, 2002). However, both of these assumptions have been effectively challenged (Haddad, 2011; Jung, 2007; Matin, 2013; Phillips, 2015; Ruthven, 1997). Analytically, most existing accounts variously concentrate on IS's immediate origins in the aftermath of the 2003 Iraq war (Al-Tamimi, 2014; Hashim, 2014)<sup>4</sup>, its *salafi* (fundamentalist) doctrine (Al-Ibrahim, 2015), religious zeal (Wood, 2015), organisational structure (Acun, 2014; Hashim, 2014), military tactics (Katagiri, 2015), revenue sources (Kan, 2014: 15; Tripp, 2015), hyper-recruitment of foreign fighters (Al-Ubaidi, 2014; Basit, 2014), or necessary measures for defeating the movement (Cordesman, 2014; McCants, 2014), or a combination of two or more of these aspects (Fromson and Simon, 2015).

Accounts that highlight longer term, contextual factors on the other hand tend to be unsystematic and uncritical, relying more on assumptions and assertions than theoretically informed analytical and substantive arguments. Recurrent references to the Sykes-Picot agreement, which divided the southern provinces of the collapsing Ottoman Empire between France and Britain during the First World War laying the territorial ground for the formation of modern states of Iraq, Syria, Lebanon and Jordan, are an important case in point.<sup>5</sup> However, as Toby Dodge has argued these accounts over-interpret a particular, albeit crucial, moment in the history of the region, and analytically elide complex and contingent historical processes that have intervened and mediated between the Sykes-Picot and IS (Dodge, 2014, cf. Ayubi, 1995: 86). Moreover, their emphasis on the incompatibility between the nation-state form and the ethno-religious diversity of the region betrays an essentialist view of non-national forms of identity and an imputation of semiotic fixity to religious texts and the lack of agency to their readers (cf. Asad, 2003: 11; Mamdani, 2009, 1996).

Marxist commentators have correctly placed the phenomenon of IS within the wider contradictory dynamics of the globalisation of capitalism, highlighting problems of alienation, inter-cultural *ressentiment* and self-differentiating imitation, and the social and cultural dislocation wrought by the global neo-liberal project (Alexander 2015; Mishra 2015). However, these brilliant meta-contextual analyses tend to downplay, or adopt a reductionist approach to, the question of cultural difference, sectarian difference in particular, failing to conceptually link their general and abstract arguments to the concrete process whereby sectarian difference or tension has been transformed into sectarian conflict. Addressing this process is indeed a key aim of this paper.

Thus, despite the abundance of analysis and commentary on IS, no compelling explanation given to the fundamental question as to ‘how something so improbable became possible’ (Anonymous, 2015). The significance of this basic puzzle is thrown into a sharper contrast if we consider the fact that throughout the twentieth century Iraq (and Syria), has been the cradle and standard bearer of secular Arab nationalism in the Middle East (Hourani, 2013: 291, 294; Salem, 1996). In this paper, I address the general and specific conditions of possibility of sectarianisation of politics in Iraq culminating in the rise and success of IS. I do so through a conjunctural analysis anchored in an international historical sociology of Iraqi state-formation. These conjunctural and contextual moments of the argument are integrated through the idea of uneven and combined development (UCD). I argue that the proximate cause of IS’s rise and success was the intersection of three main processes: the US-led dismantling of the Iraqi state through economic sanctions and war (1991-2003), the sectarian reconstruction of the polity after the 2003 US-led invasion of Iraq, and the authoritarian neoliberalisation of the regional political economy that underlay the uneven unfolding of the ‘Arab Spring’ and the general success of the autocratic counter-revolution it elicited. This counter-revolution neutralised broadly democratic-civilian opposition in the Arab Middle East, including reformist Sunni Islamist movements such as the Muslim Brotherhood in Egypt and Syria, which rendered Sunni jihadi groups such as IS the only effective vehicle for the expression of the growing popular discontent in the region.<sup>6</sup>

Crucially, the efficacy of this conjuncture was rooted, (and this is the contextual, more dominant element of my argument) in the anterior circumstance of the fundamental contradictions involved in the rise of Iraq as a modern polity. For the historical process of the construction and evolution of the Iraqi state, I will show, pre-empted the formation of an Iraqi nation through the intermittent but steady reproduction, valorization, and politicization of supra-national (religious-sectarian) and sub-national (ethno-tribal) identities. Both this paradoxical processes of nation-state formation and the specific neoliberal conjuncture in world politics in and through which it eventually exploded were international in their constitution and dynamics.

The remainder of this paper is divided into three main sections. First, I present the intellectual framework of my argument through a critical discussion of UCD and the method of ‘conjunctural analysis’. Second, I present the substantive argument focusing on colonial state-formation and its paradoxical amalgamation of the institutions of modern state with a substantively tributary social structure dominated by tribal affiliations and sectarian identities. Crucially, despite certain modifications this basic circumstance was internationally reproduced during the post-colonial period. The cumulative result was the subversion of the politico-cultural consolidation of the ‘abstract individual’ (Marx cited in Sayer, 1991: 64), that is, a person released from relations of personal dependency underpinning his or her social reproduction, as the strategic basis of national coherence away from the paramountcy of sub-national and supra-national political loyalties and cultural identities. It was within this socio-historical context that pre-existing cultural *difference* was first transformed into sectarian *tension* under international sanctions regime of 1990s, which reinvigorated communitarian affiliations and networks as both the more immediate source of material reproduction and the main intermediary in accessing state resources. In the aftermath of the 2003 war, which destroyed the Ba’athist state, and following the consociational reconstruction of the Iraqi state that favoured the majority Shi’a population and the

subsequent success of the authoritarian counter-revolution elicited by the ‘Arab spring’, which by and large eliminated secular opposition forces in the region, this sectarian tension was transformed into sectarian *conflict*. In a short, concluding section I reflect on the wider implications of my argument.

## **2. UNEVEN AND COMBINED DEVELOPMENT AND CONJUNCTURAL ANALYSIS**

The past twenty years or so have witnessed the growing emergence of a new Marxian strand of historical sociology within the academic discipline of International Relations (IR). This intellectual strand seeks to complete the dialectics of the earlier literature’s focus on the social substratum of international relations which was theoretically obscured by mainstream IR’s geopolitical reification. It does so by demonstrating the causal and constitutive significance of ‘the international’ for the rise and development of specific social orders. By ‘the international’ I refer to ‘that dimension of social reality that specifically arises from the existence within it of more than one society’ (Rosenberg, 2006: 308).<sup>7</sup> UCD has emerged as the main intellectual idiom of this international historical sociology. It was first developed by the Russian revolutionary Leon Trotsky, who deployed it in his original account of the peculiarities of capitalist development and the proletarian revolution in Tsarist Russia (Trotsky, 1985). Its conceptual core as further elaborated upon by Justin Rosenberg is threefold (Rosenberg, 2006). First, unevenness posits multiplicity and differentiation as a general ontological condition of social existence. Second, unevenness *ipso facto* conditions and is reconditioned by processes of change within and across interacting societies. This interactive process ontologically blurs the analytical distinction between the ‘internal’ and ‘external’, as it necessarily generates particular ‘combinations’ of its own component parts, continuously generating new iterations and dynamics of unevenness. Crucially, combined development is an open-ended and politically charged process. It involves active agents, differentially located within a complex structure of uneven power relations, borrowing and adapting available resources in order to create ‘new’ social orders or reform existing ones — a process fraught with unintended consequences. The category of combination thereby denotes how social structures and relations within particular human geographies are shaped by and constituted through their interactions with, and implication in, differentially constituted formations. Such interactions are in turn generative of unique amalgams of ‘native’ and ‘foreign’, old and new forms that resist theories and concepts that rest on monadic ontologies. Third, this intrinsically ‘uneven’ and ‘combined’ character of social change finds its concrete expressions in historical processes of ‘development’. Development is, of course, among the most controversial and Eurocentric concepts in the social sciences (cf. Nisbet, 1969; Nederveen Pieterse, 2001). In Trotsky’s formulation, however, development is neither unilinear nor homogenous/homogenising but interactively multilinear. In this respect, UCD fundamentally reconceptualises the (re)productive activities of human collectivities that are implicated in their mutually constitutive relations. These relations in turn produce differentiated societal outcomes and underpin ‘processes of directional change over time, which can be theorised by analysing the causal properties of particular structures of social relationships’ (Rosenberg, 2007: 330).

‘Unevenness’ and ‘combination’ are general abstractions. Their deployment for substantive analysis therefore requires intermediate concepts. A number of such concepts can be found in Trotsky’s own work and the more recent literature on UCD



(Matin, 2013a: 17-19). Two of them that are particularly pertinent to the present argument are ‘substitution’ and ‘sociological amalgamation’. Substitution refers to the mobilization of various replacements, native and foreign, in late-modernizing polities, for the agency, institutions, instruments, material or methods of earlier processes of modernization in West European countries (Matin, 2013a: 19). The leadership of a rapid and comprehensive industrialization projects by the Junker landed aristocracy and an absolutist monarchy in Germany and Russia, respectively, and a peasant (socialist) revolution in China are important examples of this circumstance. Substitution necessarily entails amalgamated forms that are dynamically tension-prone since they are inorganic to the modernizing society. Moreover, substitutions create new political and developmental possibilities unforeseen or suppressed by Eurocentric and unilinear theories of history. The occurrence of a ‘socialist revolution’ in ‘backward’ Russia, an event Trotsky had predicted and actively pursued, is a glaring example.

Now, as stated above my account of IS also contains a conjunctural moment. This necessitates some critical reflections on the method of ‘conjunctural analysis’. For in the Marxist tradition conjunctural analysis is essentially a methodological device for historicizing the organic tendencies of capital so that the analytical gap between their abstract conceptions and concrete historical instantiation and operation is closed (Rosenberg, 2005: 29-40). In this established sense conjunctural analysis avoids an unmediated deductive mode of historical explanation but retains the conception of capital as the predominant cause of historical process in the modern epoch. However, as the preceding discussion of UCD demonstrates, in an UCD-anchored form of conjunctural analysis the basic assumption and point of departure cannot be *capitalist production* but *interactive reproduction*. This is essentially because as the growing literature on UCD has shown capital’s causal significance and operation are always embedded in, and overdetermined by, the international. This circumstance problematizes a clear conceptual and explanatory separation between capital and the international and hence the attribution of primary causality to capital in advance of the actual conduct of substantive conjunctural analysis.

It should also be clear by now that conjunctural analysis is the methodology of choice for UCD since every analytical deployment of UCD requires the investigation of a set of intersecting developmental and international patterns and processes and their impact as it socio-historically congeals in a given geo-political space. I hope the foregoing argument will become clearer in the following account of Iraqi state formation and deformation culminating in the rise of IS. But before proceeding, a definitional note on the ‘nation’ is in order.

I adopt Benedict Anderson’s seminal definition of the nation as an ‘imagined political community – and imagined as both inherently limited and sovereign’ (Anderson, 2006: 6).<sup>8</sup> The ‘political’ and ‘sovereign’ properties of the nation in Anderson’s definition clearly suggest that for him the nation can only exist as a *sovereign* state, sovereign in the modern sense of the word, i.e. a form of collective autonomy that is rooted in the dominance of social reproduction processes by capital. Through its institutional differentiation between the economic and the political, capitalism enables a purely political definition of independence that poses no fundamental barrier to transnational accumulation (Wood, 1981; Rosenberg, 1994; Teschke, 2003). The dominance of capital involves the generalisation of commodity exchange and wage labour, both of

which are predicated on ‘so-called primitive accumulation’ (Marx, 1990: Ch. 8). This process visits upon the non- or pre-capitalist community (*Gemeinschaft*) an objective and subjective disintegration giving rise to capitalist ‘society’ (*Gesellschaft*). The violent abstractions involved in this process generate both the possibility and the necessity of the nation, or rather its imagination by abstract-individuals, as a re-integrative *real* abstraction (Cemgil, 2015). This sociological content of nation is under-appreciated in Anderson’s theory which rests on a limited, technological conception of capitalism as ‘print-capitalism’. This move by Anderson can be seen as an ingenious intellectual device to resolve the empirical contradiction of the presence of potent forms of nationalism in societies that have not undergone primitive accumulation and substantive capitalist development (Matin, 2013a: Ch. 4). In fact, Anderson locates the raise of nationalism in colonial (Spanish) Latin America where there were indeed very limited levels of capitalist development.

However, as I have argued elsewhere this problem can be solved once we adopt an international conception of capitalist modernity. In this conception the correspondence between capitalist relations, the national imagination and nation-formation processes do not have to take place at the ‘national’ or local level but at the international level, thus taking into account the geopolitical and geoeconomic mediation of the correspondence (Matin, 2013a: Ch. 4; cf. Nairn, 1977). This intellectual move also enables a better conceptual comprehension of the phenomena of ‘negative sovereignty’ and ‘quasi-state’ (Jackson, 1993; Migdal, 1988; Thomson, 1995), which mark many postcolonial states. These states enjoy international-juridical legitimacy due to their recognition by other states but lack internal freedom and legitimacy due to their inability to (fully) overcome pre-national, i.e. infra- and supra-national, forms of collective self-identification. These problems are rooted in the inflected or incomplete process of primitive accumulation. The result is the subordination of concrete, not abstract, individuals of sectarian and communitarian forms of association to a state with a modern form and institutional configuration.<sup>9</sup> In other words, the state assumes ‘citizens’ but dominates ‘subjects’. The sociological result is the phenomenon of ‘the citizen-subject’, a hybrid, contradictory and dynamic agency. This process involves the building of communitarian centrifugal forces into the structure of the emergent ‘state-nation’ (Rejai and Enloe, 1969) which it can only contingently manage. The latter, as we shall see, is highly pertinent to the modern Iraq.

### **3. MODERN IRAQ: THE UNEVEN AND COMBINED DEVELOPMENT OF A STATE-NATION**

#### **3.1 The Ottoman origins**

Modern Iraq was formed out of the merger of the three Ottoman provinces of Mosul, Baghdad and Basra, which fell under the British mandate at the end of the First World War (WWI). These provinces were marked by a multi-layered unevenness (cf. Batatu, 1978: 13-19). The southern part centred around the port city of Basra was marked by a commercial economy firmly integrated into the world capitalist market following the opening of the Suez Canal in 1869. This integration accelerated the drive for cash-crop production and growth of tax-farming — often under semi-servile conditions of sharecropping — in the northern parts of the fertile crescent that included much of the Iraqi parts of Mesopotamia (cf. Haj, 1997: 5).<sup>10</sup> That the population of Basra province

was predominantly Shi'a and that of Baghdad and Mosul provinces mostly Sunni, superadded a latent sectarian dimension to this regional economic unevenness between southern regions and rest of the territory that would become Iraq. Moreover, unlike the largely Arab ethno-linguistic identity of the Basra and Baghdad provinces the population of the Mosul province, which covered most of the north of contemporary Iraq, was predominantly Kurdish mostly engaged in pastoral nomadism and semi-settled, small-scale sharecropping agriculture (cf. Al-Khafaji, 2004: 27-28). Moreover, under the Ottomans the Kurdish principalities had been given high levels of local autonomy by the Ottoman state in return for their political and military support in its ongoing geopolitical rivalry with Iran. Consequently, the Ottoman regional and local authorities had little influence or even presence in the Kurdish regions. The freshness of the memories of this high level of autonomy was central to the Kurdish nationalist movement after the collapse of the Ottoman empire and the division of Kurdistan among multiple new states.

This threefold political-economic, sectarian, and ethnic internal unevenness was implicated in a wider international axis of unevenness that had emerged following the capitalist development and industrialisation in North Western Europe. During 'the long nineteenth century' the Ottoman territories that eventually formed Iraq were one of the key sites at which Euro-Ottoman geopolitical interaction animated a combined pattern of development. This developmental pattern was dynamized by uneven temporalities that broadly corresponded to capitalist and tributary modes of production, respectively. Under Europe's 'whip of external necessity' (Trotsky, 1985: 27), the Ottoman state initiated a 'defensive modernization' <sup>11</sup> project, commonly known as *tanzimat* (reordering). The project sought to encourage and formalise private property in land through giving title (*tapu*) deeds to the cultivators, and to centralise the state-administration through the replacement of local strongmen with governors directly sent from the Sublime Porte (Hoffmann, 2008). Both sets of reforms aimed at improving the empire's tax revenue, countering centrifugal forces that European economic encroachments had engendered in many Ottoman provinces. They also aimed at pacifying nomadic and semi-nomadic tribes by encouraging them to settle down through promises of land ownership and reduced taxation.

However, due to technological underdevelopment, administrative corruption and the illiteracy of an overwhelming majority of the peasants, the implementation of the 1858 Ottoman land law in Iraq paradoxically gave rise to a class of large landlords dominated by tribal chiefs or *sheikhs* and urban notables. Both groups acted, in effect, as absentee landlords relying on sub-chiefs or *sirkals* (Abdullah, 2011: 82). Thanks to a dynamic similar to that which drove the 'second serfdom' in Eastern Europe (Brenner, 1976: 41 and *passim*), this large landed class's implication in world capitalist market through trade reinforced, rather than weakened, pre-existing, non-capitalist sharecropping production and labour practices and hence 'relations of personal dependency' and their concomitant communitarian ideologies (Al-Khafaji, 2004: 30-36). This went directly counter to the formation and consolidation of the sociological basis of capitalist modernity, which as Marx argued, was centrally dependent on the impersonalisation of pre-capitalist social relations of reproduction through the generalisation of wage labour and commodity exchange (Sayer, 1991: 13-14). This circumstance and its staggered but steady reproduction, as we shall see, became a major barrier to the formation of a



sociological basis for the rise of a stable national identity and national consciousness in Iraq.

In the administrative domain, the combination of a more vibrant mercantile economy in the Basra province and the Ottoman state's general bias against the Shi'as meant that Sunni Arabs came to disproportionately populate the Ottoman administrative machinery and the local army. Irrespective of their actual and ideological intentions the Sunni Arabs' domination of the Ottoman governmental organs built a passive Sunni sectarian identity into the new Iraqi state that the British colonial officials constructed from the Ottoman institutional material they inherited. This Sunni military-technocratic class's education and exposure to political developments and intellectual trends in Istanbul and Europe amounted to a 'bureaucratic pilgrimage' (Anderson, 2006: 114). Consequently, it became the harbinger of (pan-)Arab nationalist ideology, which played a decisive role in the political history of modern Iraq.

### **3.2 The British Rule, 1917-1932**

The product of the Ottomans' failed defensive modernisation in Iraq became the subject of an illiberal modernisation project under British colonialism following WWI. Britain's belated colonial rule over Iraq was strategically overdetermined by three international circumstances. The rise of the US as the leading world capitalist power, the geopolitical exigencies of protecting India, the jewel in the crown of the British empire, and the rise of oil as strategic commodity following the revolutionary impacts of the use of internal combustion engines in WWI. A key element of the emergent *Pax Americana* was nations' right of self-determination. This Wilsonian maxim of the American grand-strategy arguably had two main aims: opening up British and other European colonial possessions to free trade and American capital and commodities, and countering the appeal of the Bolsheviks' anti-colonial strategy following the 1917 Russian revolution, which also called for the national self-determination of non-European colonised peoples (Dodge, 2003: 5).

The juridical reflection of these overlapping circumstances was the fact that Britain's rule over Iraq was formally based on a League of Nations 'mandate', which involved an in-principle acceptance of Iraq's right to become a sovereign state. Britain's mandatory rule therefore meant to lay the institutional grounds for Iraq's *de jure* independence at a future date. However, Britain's construction of Iraq was also impacted by its economic decline due to the war and the rise of US capitalism, and the geo-political pressure of the victory of the Russian revolution and the growing communist and anti-colonial movements.

Against this background, the British initially embarked on direct colonial rule over Iraq, a strategy that was championed by Arnold Wilson, who represented the 'Eastern school' of British colonial administration (Dodge, 2003: x, 8). This was however short-lived. It was abandoned following the 1920 anti-British revolt also known as the 'Great Iraqi Revolution' (Dodge, 2003: x; Vinogradov 1972). Thenceforth, Britain's governance of Iraq was based on a politically reformist and socially conservative form of 'indirect rule' (Batatu, 1978: 24). The former aspect of this hybrid governance mode was reflected in the construction of the bureaucratic organs of a nation-state in the form of a constitutional monarchy and an elected parliament loosely based on the British

model albeit with strategically placed British officials in key ministries and institutions ensuring firm British tutelage over the Iraqi government. The conservative aspect of the British illiberal state-building project became manifest in the further empowerment of the tribal leaders as the local enforcers of law and order backed by RAF as the weapon of last resort, whose efficacy was proved in the defeat of Arab and Kurdish revolts during the 1920s (cf. Dodge, 2003). The basic tension lay in the fact that the political reformist aspect of Britain's indirect rule over Iraq assumed the existence of 'the abstract individual', the 'liberal' subject invested with a 'double-freedom': freedom from constraints of relations of personal dependency and freedom from access to means of reproduction, both of which result from the process of 'primitive accumulation'. The latter, socially conservative, aspect of the British rule on the other hand substantively reproduced and reinforced relations of personal dependency, and hence tribal collective forms of politico-cultural identity and loyalty, which were sociologically constitutive of Iraq as an emergent political entity. It was the inner contradiction of this sociological amalgamation – generated by uneven and combined development – that animated Iraq's tension prone evolution over the course of subsequent century of crisis.

Tribal *sheikhs*' reinforced and valorised power and status was epitomised in the 1916 introduction of the 'Tribal Civil and Criminal Disputes Regulation (TCCDR), modelled after a similar law in India [which] gave certain selected sheikhs the authority to settle all disputes within their tribes and to collect taxes for the government' (The Law Library of Congress, 2004: 14). The TCCDR was subsequently incorporated into the 1925 Iraqi constitution. The introduction of TCCDR was accompanied by the abolition of the Ottoman-established local elected councils. This placed the governance of the vast rural areas, where more than 80 percent of the Iraqi population lived, firmly in the hands of tribal leaders. The intervention also set in train a chronic tension between the rural and the urban, and between tribal leaders and urban elites (Dodge, 2003: 63-82). An additional inter-tribal fault-line was introduced by the fact that the British bestowed support and largesse only on friendly and capable 'paramount' sheikhs who as a result would become 'recognised' – as opposed to 'nominal' – sheikhs. Moreover, family and personal status laws were subjected to the Islamic law administered by differentially operating Sunni and Shi'a Shari'a courts formalising the sectarian division in the urban areas too (Abdullah, 2011: 103).

The combined sociological effect of these circumstances was that most Iraqis' membership of the purportedly emerging Iraqi nation was mediated through their more basic and determinative membership of a particular sect, tribe or village community. By avoiding the primitive accumulation and hence the production of the 'abstract individual' — the sociological content of liberal citizenship — and formalising personalised forms of corporate subjecthood, British indirect rule therefore fundamentally subverted the emergence of a socially grounded Iraqi national consciousness and an Iraqi state with universal legitimacy and authority domestically (cf. Tripp, 2002: 69-70). In fact, Britain's curtailment of the development of the central government's armed forces and its continued arming of tribal leaders excluded mandate Iraq from the classic Weberian definition of the state as the authority with a monopoly over the means of legitimate violence within a specific territory (Weber, 1946: 77). During Faisal's kingship, the government possessed 1500 rifles while the tribes had 100,000 (Abdullah, 2011: 103). Thus, the combination of the sheikhs' land-ownership,

juridical and administrative authority, and military power meant that in the colonial construction of the Iraqi state the tribal overdetermined the national. This was the fundamental challenge facing Iraq's political class throughout the mandate and post-independence periods.

The substitution of tribal corporatism for liberal individualism in the colonial construction of modern Iraq entailed a second consequential substitution, namely, the substitution of pan-Arab nationalism for Iraqi nationalism.<sup>12</sup> Facing the internal tribal barrier to their nationalist-modernist agenda a powerful strand of Iraq's intellectual and ruling elites grounded the legitimacy of their political project in the external, abstract and supra-Iraqi pan-Arab nationalism. This circumstance was ideologically supercharged by the effects of the intermediate level of regional unevenness that intervened between the domestic and international plains of developmental unevenness in which, as mentioned earlier, Iraq was entangled. For despite being socio-politically less developed compared to other major Arab states, especially Egypt, Iraq won its independence earlier (Hourani, 2013: 299). This 'privilege of historic backwardness' (Trotsky, 1985: 26), which for Trotsky is a key feature of uneven and combined development, imbued the Iraq's intellectual and political elites with a sense of historical mission for uniting desperate Arab states into a single, powerful state. In the discourse and praxis of these elites the entire Arab world was therefore substituted for Iraq. In other words, the territorial scope of these elites' nationalism was the entire Arab world. Consequently, all strategic policies had to be directed to a single, unified Arab state. This strategic political posture downplayed national, specifically Iraqi, political and developmental projects or subordinated them to a wider regional project of Arab political unification. The result was a politics inseparable from, or subsumed under, geopolitics. Ba'athist Iraq's involvement in multiple inter-state conflicts and friction can be traced to this circumstance.

The resulting tension and rivalry between the so-called 'Iraq-first' and pan-Arab strands of Iraqi nationalism left a major imprint on the modern history of Iraq (Tripp, 2002: Ch. 3). The original members of the ex-Ottoman Sharifian officers who populated the high echelons of the army and many state institutions during the mandate period and the younger cadre of Iraqi officers who were educated and trained in the new Iraqi institutions broadly, though not exclusively, represented these two strands, respectively. The pan-Arabism of the new Iraqi monarch, King Faisal Hashimi (1885-1933), was valorised by the fact that he had no Iraqi pedigree – he was from the part of the Arabian Peninsula which became the state of Saudi Arabia – and hence no domestic base of support. This was one of the reasons why the British had invited him to rule the new Iraq (Walker, 2003: 31). King Faisal tried to create a broader domestic basis of support by including more Shi'as and Kurds in the government. But he failed to overcome opposition by the British and Sunni Arab elites, even though his promotion of education expanded the bourgeois intelligentsia, the creators and bearers of nationalist sentiments (Batatu, 1978: 25). This failure and his appointment of the pan-Arabist intellectual Sati' al-Husri (1880-1968) as the director general of education alienated both the Shi'as and the Kurds who resented their minoritisation by a Sunni pan-Arabist state.

### **3.3 Independence and monarchy, 1932-1958**

Iraq's formal independence in 1932 gave the monarchy a certain freedom of action. Viewing the army as central to his nation-building vision, King Faisal introduced the conscription law in 1934. The expanding army became a fertile ground for the further growth and spread of nationalist ideas and sentiments but it remained dominated by Sunni Arabs who 'saw themselves as the Prussians of the Arab world [and] admired Mustafa Kemal's achievements in Turkey ...' (Abdullah, 2011: 104). The army rapidly emerged as the political arbiter in the country but both pan-Arab and Iraq-first nationalist factions remained either unable to challenge or dependent on big rural-tribal and urban-absentee landlords. This left their nationalist discourse and agitation with no domestic base other than the popular resentment towards Britain's continued de-facto colonial rule.

The death of King Faisal and the rise of the pan-Arabist and pro-Nazi Ghazi to the throne in 1933 further strengthened the pan-Arabist factions within the army. However, the overlap between the domestic visions of the Iraq-first nationalists and the newly established and rapidly growing Iraqi Communist Party (ICP) ensured a certain political parity between the two factions. The regency of Abdul-Ilah (1913-1958) and the premiership of Nuri al-Said (1888-1958), two pro-British figures, following the death of King Ghazi (1912-1939) in 1939 further strengthened the tribal landed classes. These classes soon enjoyed even lower taxation by the state thanks to the government's access to markedly increased oil revenue following a 50-50 profit sharing arrangement with the British dominated Iraqi Petroleum Company (IPC) in 1952. However, the oil revenues were 'spent largely to promote the interests of the tribal oligarchy and to reproduce non-capitalist agriculture' (Haj, 1997: 1). With its authority in the vast rural areas curtailed by the big landlords and tribes, the state's growing oil revenues led to the further disconnect between the central government and the masses, which it could not more effectively control or co-opt. Thus, the mandate era's contradictory amalgamation of a formally national state and a substantively communitarian society was reproduced in an inflected manner.

Under the condition of a domestic deadlock between nationalist elites and the tribal landed classes, international dynamics exerted the greatest influence on politics in Baghdad and other major cities. The occupation of Palestine and the heightening Cold War were two major factors. Britain's role in the partition of Palestine followed by the rapid rise of Egypt's pan-Arabist General Gamal Abdel Nasser (1918-1970) further mobilised Iraq's army officers and urban and educated classes against the pro-British government. Nasser's radical land reform, which eliminated big landlords in Egypt, his nationalisation of the Suez Canal, and his survival of a tripartite assault by Britain, France and Israel provided Iraqi nationalists with a highly attractive, motivating and heroic model. The 1955 anti-Soviet Baghdad pact – also known as the Central Treaty Organization (CENTO) – between Iraq, Iran, Turkey, Pakistan and the UK sponsored by the US – further inflamed Iraqi nationalists and isolated the monarchy. Still, the final push came from the army led by General Abd al-Karim Qasim (1914-1963), the nationalist leader of Iraq's Free Officers movement, which was modelled after its Egyptian counterpart led by Nasser. Qasim had served with Iraq's small contingent in the 1948 Arab-Israeli war and returned to Iraq, like many other members of Iraqi Free Officers, with bitter resentment towards the monarchy and its British overlords (Batatu, 1978: 766). The success of the Qasim-led putsch on July 14, 1958 was swift. Its resonance with the anti-monarchical and anti-British popular mood, especially in the

big cities, quickly turned it into a political upheaval of revolutionary proportions with the masses on the streets for days (cf. Batatu, 1978: 806).

### **3.4 The republican interregnum and the Ba'athist rise, 1958-1991**

The new republic that was declared by the putschists inherited an Iraq where tribal and sectarian divisions left the formally national character of the state bereft of a sociological foundation: more than 20% of the population was landless and 60% of the cultivated land was owned by the big landlords of whom 49 families owned 17% of the land, most of which was cultivated based on a share-cropping system dominated by semi-feudal relations (Abdullah, 2011: 111). The national refinement of this paradoxical amalgamation of a formally modern republican state and a substantively pre-modern tributary society became the major task of the Iraq's rulers following the 1958 overthrow of the monarchy. And no force seemed more prepared and willing to do so than the Ba'ath party.

Making pan-Arab unity its defining mission and yet facing pre-national fragmentation as its structural context of operation the Ba'ath party in effect substituted its tight and super-centralised organisation for the absent nation it insisted it represented. The Ba'athists arguably embodied Trotsky's description of the Jacobins who, he suggested, 'spared no human hecatomb to build the pedestal of their Truth .... The counterpart to their absolute faith in a metaphysical idea was their absolute distrust of living people' (cited in Deutscher, 2003: 75). The 'Truth' of the Ba'athist was the Arab nation. However, the road to Saddam Hussein's 'Republic of Fear' (Al-Khalil, 1989) soaked in blood and violence began with some early attempts at a semi-social democratic nation-building project by Qasim. Qasim sought to cultivate national unity through a number of measures including formation of a 'sovereignty council' that consisted of a Shi'a Arab, a Sunni Arab, and a Kurd. He also eased the constraints on the operation of the ICP, which provided Qasim's government with critical support even though the party was never given an official license. Qasim also pursued a secularisation agenda that included the limitation of the operation and jurisdictions of the Shari'a courts especially in the area of family law. The interim republican constitution also explicitly defined the new republic as a bi-national state, a partnership between the country's Arabs and Kurds.

However, perhaps most importantly, Qasim presided over a radical overhaul of rural relations. The old TCCDR was abolished and a new land-law placed ceilings on land holdings. Land over that ceiling was expropriated with compensation and redistributed to the landless peasants. This radical land-reform destroyed the political power of the big landlords and strengthened urban workers and lower and middle classes (Batatu, 1978: 807). But due to the lack of a clear agricultural strategy and the government's urban-industrial bias, it led to a massive rural-urban migration of the kind that also took place in neighbouring Iran in the mid-1960s following the Shah's land-reforms in 1963 (Matin, 2013a: Ch. 5). By 1980 the share of agriculture in the GNP had declined to only 8% (Abdullah, 2011: 121). The socio-politically liberal potentials of this quasi primitive accumulation were suppressed due to the growing oil revenues of the state following the confiscation of 99.5 percent of IPC's concession land in 1959. For now, as a proper oil rentier-state, the Iraqi government turned a considerable portion of the population into its own employees. Thus, sociologically speaking rather than the



‘commodity’ it was ‘the state’ that mediated depersonalised relations of reproduction; a circumstance that involved the directly political overdetermination of formally free individuals by a nominally national state that refused or failed to develop civil society bourgeois institutions, relying instead on the army and, increasingly, security apparatuses. The nation-formation edge of Qasim’s revolution was further blunted by the sectarian-tribalist power-structure that the subsequent Ba’athist coup against Qasim entailed.

The Ba’athists and Nasserists in the army resented Qasim’s reluctance to immediately join the — eventually failed — United Arab Republic (UAR), which had unified Egypt and Syria, his failure to suppress a new round of Kurdish revolt in the north, and his soft approach to the ICP. While Qasim’s withdrawal from CENTO was to the liking of the Ba’athists, his establishment of diplomatic relations with the Soviet Union and China provoked their virulent anti-communism. Having failed to create a broader social basis for his political power or properly organise the support he had, and having made some tactical mistakes Qasim was therefore isolated and vulnerable. His Nasserist deputy, Abdul-Salam ‘Arif, aided by his right-hand man Ahmad Hassan al-Bakr, led a successful Nasserist-Ba’athist coup in 1963. Through a quickly formed paramilitary force called the ‘National Guard’, the Ba’athists embarked on a ruthless persecution of the communists.

At the time of the successful coup against Qasim, the Ba’athists had a very narrow basis of support among the pan-Arabist army officers. Lacking sufficient power and support within the army to prosecute the coup alone they initially had no choice but to acquiesce in the leadership of the Nasserist Abdul Salam ‘Arif (1921-1966), who himself was not a Ba’athist, but had considerable support within the army’s pan-Arabist officers. Like his predecessor, ‘Arif too recognised his small power-base and his overreliance on the army. But he too decided to address this problem through an essentially anti-national measure, namely, relying on his tribal kinsmen of the Jumayla tribe in the district of Ramadi. Crucially, the Ba’athists’ initially relatively more secular, nationalist and inclusive structure soon also underwent a Sunni, tribal reorganisation. Their unwritten partnership with ‘Arif progressively became strained as they continued expanding their National Guard which engaged in systematic violence and blind brutality. Exploiting some divisions within the Ba’athists, ‘Arif dissolved the National Guard and cracked down on the Ba’athists. However, many Sunni Ba’athists survived the purges thanks to their contacts within the still pre-dominantly Sunni army. The resurrected Ba’ath party had therefore a dominant Sunni component whose members disproportionality hailed from the Sunni district of Tikrit, the home region of two leading Ba’athists, namely, Ahmad Hassan al-Bakr (1914-1988) and Saddam Hussein (1937-2006). In the meantime, ‘Arif pursued a broadly Nasserist strategy. He called for union with Egypt and Syria and held some talks that produced no results. Paradoxically he also recognised Kuwait’s sovereignty without reaching an agreement on exact borders. ‘Arif also brought many industries, including the banking sector, under direct state control as part of a rapid project of top-down industrialisation. But the nationalisation policy led to considerable capital flight and was soon retracted.

Two events sealed the fate of ‘Arif’s fragile government: a new Kurdish revolt whose attempted suppression ended in multiple defeats for the army, and the 1967 Arab-Israeli War which irreparably damaged the popularity and attraction of Nasser and by

implication Nasserist forces in the region including in Iraq. A reorganised and Sunni-dominated Ba'ath party took power in a bloodless coup in 1968 followed by a massacre of the communists, in which the Ba'athists received covert support from Western intelligence services.

Al-Bakr and Hussein re-organised the government along Ba'ath party's tight party organisation with the former heading the new Revolutionary Command Council (RCC) - as the highest state authority - and the offices of president, prime-minister and commander-in-chief and the latter the vice-chairman of the RCC and deputy secretary of the party. However, the Ba'athists awareness of their lack of broad popular support led to the adoption of several initiatives.

First, they introduced a new round of land-reform, addressing the problem of landlessness through new rounds of land redistribution and the foundation of cooperatives and state-farms. Second, the Ba'athist government embarked on a new rapprochement with the Kurds, calling in March 1970 for the establishment of a new Kurdish autonomous region with a parliament and Kurdish as an official language. Third, in 1972 the government began a new round of nationalisation of the oil industry. Then following the 1973 Arab-Israeli war all foreign assets in the oil industry were taken over by the state. The timing was fortuitous. In the previous year Iraq had signed a long-term Treaty of Friendship and Cooperation with the Soviet Union which supplied it with Soviet technical assistance in the development of the oil industry while the massive hike in oil-prices in 1973 led to the overflowing of state coffers. And fourth, the government delegated to Saddam Hussein to establish a security and intelligence apparatus to defend the state against multiple internal and external threats. The relatively autonomous layers and vast scale of this apparatus, which was directly accountable to and controlled by Hussein, was such that by 1978 around 20% of all state employees, which included more than 40% of breadwinners of all households, worked in one of several state security services (Abdullah, 2011: 131). And in an attempt at full control and loyalty Hussein deliberately populated, especially after 1979, the higher echelons of the security organisations with his tribal kinsmen from Tikrit region giving the state-security, the nerve centre of the Ba'athist party-state, a markedly sectarian and tribal colour.

The combination of an all-encompassing state-party apparatus and an extremely high level of the relative autonomy of the state thanks to the massive oil revenues<sup>13</sup>, and unrestrained and systematic repression gave the Ba'ath party-state relative stability. This was reinforced by the greater international legitimacy and support following alignment with the Soviet Union, which facilitated the pacification of ICP and the Kurds. The rentier economy also enabled the introduction of a kind of authoritarian welfare-state that involved the exchange of socio-economic provisions for political acquiescence. Combined with the formal secularism of the Ba'athists' pan-Arab nationalism, this authoritarian welfare-state allowed the Ba'ath party-state to acquire a degree of active or passive support from the wider population. Thus, autocratic welfare system was substituted for political pluralism and participation.

The exception to this overall self-stabilisation dynamic in Ba'athist Iraq was Kurdistan. The Kurds could not be assimilated into the Ba'athists' chauvinistic Arab nationalism, and they persisted in their demand for autonomy. As a result, they remained subject to

military suppression and political marginalisation. The Ba'athists' tactical Kurdish opening in 1970 therefore soon ended in a bloody conflict. The regime was able to defeat the Kurdish movement only after it succeeded in cutting the US-backed Iranian support for the Kurds through conceding to the Shah of Iran's demand that the mid-point of Shatt al-Arab (*Arvand-Rud*) be the new border between the two countries. Iraq then launched an 'Arabisation' (*ta'arib*) project replacing Kurdish inhabitants of key areas such as the oil-rich Kirkuk with Arab tribes from the south and the demolition of Kurdish villages to deprive Kurdish *peshmargas* (guerrillas) of local support.<sup>14</sup> The Ba'athists' anti-Kurdish policy approached genocidal levels during the 1980s when the infamous *Anfal* operations and chemical attacks against Kurdish towns and villages led to death of nearly 200,000 civilians and the destruction of 90% of Kurdish villages (Abdullah, 2011: 133, 142).

By the late 1970s therefore a Ba'athist party-state had emerged in Iraq whose stability was contingent on the cooptive potentials of its authoritarian welfare-regime, the prestige of its successful rentier developmentalism, the attraction of its still radical pan-Arab nationalism, and the efficacy of its vast and multi-organisational intelligence and security apparatus. The contextual dynamic of this process was not dissimilar to the one that underlay the rise of the original party-state in the Soviet Union. In 1903 Trotsky had opposed Lenin's conception of party organisation warning that it would lead to a situation where 'the party would substitute itself for the proletariat class, the organisation of the party substitutes itself for the party as a whole; then the Central Committee substitutes itself for the organisation; and finally, the 'dictator' substitutes himself for the Central Committee' (cited in Cliff, 1960). The reason was, as the young Trotsky had argued, that Russian backwardness had meant that for a generation of radical Russian intellectuals, including the Marxists, 'the idea of the [objectively absent] class was more important than the class itself' (cited in Deutscher, 2003: 157). With some modification the above statement also captures the situation of Iraq's Ba'ath party. There, the army was substituted for the nation, the party for the army, the security apparatus for the party, and eventually the person of Saddam Hussein for the security apparatus. In both cases uneven and combined development had married ideological, intellectual, and political products and forms belonging to capitalist temporality with socio-historical conditions that were dominated by non-capitalist relations and forms. The party-state was the emergent product of this sociological amalgamation and in essence a political-bureaucratic substitute for the agency of social classes that had driven the modern transformation of capitalism in its English birthplace. And in both Soviet and Ba'athist party-states the chain of substitution meant that the modern impersonal bureaucratic dimension of the state-structure was overdetermined by a single person whose agency and psychology were therefore highly determinative.<sup>15</sup>

When Hassan al-Bakr resigned for health reasons in 1979 Saddam Hussein took over with a fully prepared organisational power-base. He immediately purged the party and brought the entire state apparatus under his own sole control. By then Egypt's separate peace treaty with Israel and Iran's evolution into the West's 'regional gendarme' following Britain's withdrawal from the Southern region of the Persian Gulf had legitimised Iraq's claiming the mantle of pan-Arab nationalism vis-à-vis both the Israeli occupation of Arab lands and Iranian hegemony in the Middle East. While Israel was geographically distant, the non-Arab Iran was a next-door neighbour and a source of fear and resentment. This circumstance led to a conflictual approach following the 1979

revolution. The revolution simultaneously shook Iran's once mighty army and brought to power a Shi'a state whose leader Ayatollah Khomeini was virulently anti-Ba'athist and openly called for the export of the revolution to the majority Shi'a Iraq. To cement his claim to being the true heir to Nasser, solidify its rule domestically, avert a Shi'a upheaval internally and solve Iraq's limited sea access Saddam Hussein began a war against Iran that he expected to lead to a swift and crushing military victory over Iran's disintegrated armed forces. The Iranian military, however, soon reorganised itself and mounted stiff resistance cemented by Shi'a-Islamic revolutionary ideology. The war thus continued inconclusively for eight years and it cost hundreds of thousands of Iraqi and Iranian lives and left both countries in ruin. It also sharpened the Ba'ath party-state's repressive approach towards the Shi'as who had launched organised opposition since the early 1960's in the form of *Al-Da'awa Al-Islamiyya* Party (The Islamic Calling Party). Several Shi'a political groups also formed the Supreme Council for Islamic Revolution in Iraq (SCIRI) in Iran and under Iran's auspices during the Iran-Iraq War, which ended in a UN-sponsored ceasefire in 1988 re-instating the pre-war borders.

### **3.5 The destruction of the Ba'athist state and the rise of IS, 1991-2014**

Economically both Iran and Iraq suffered massively from the war. However, unlike Iran which continued to export oil from its port cities (which were further to the east of the border with Iraq and hence little affected by the war) Iraq had to borrow huge sums from Arab conservative monarchies of the region which saw the Ba'athist Iraq as a bulwark against Shi'a Iran's revolutionary expansionism. A major creditor was Kuwait which refused to write off Iraq's debts. This strained relations. Economically under pressure and facing the challenge of demobilising a huge army, and counting on American neutrality given the US hostility towards Iran, Saddam Hussein waged a quick war of annexation against Kuwait in August 1990. The timing could not have been worse for Iraq. The Soviet Union was on the verge of self-dismantlement and the US was keen on showcasing the New World Order it envisaged for the post-Soviet unipolar world it had fought the Cold War for. A UN-backed and US-led military intervention ejected the Iraqi army from Kuwait but stopped short of overthrowing the Ba'ath state lest it disturbed the regional balance of power in favour of the revisionist and the still recalcitrant Iran. However, Iraq's Shi'as and Kurds rose up, hoping they would be supported by the US. Exploiting American inaction Saddam Hussein ruthlessly suppressed the Shi'a uprising though the anti-Kurdish campaign in the north led to a UN-backed humanitarian intervention that established No-Fly Zones (NFZ) north of the 36<sup>th</sup> and south of 33<sup>rd</sup> parallels. This enabled the emergence of a Kurdish autonomous entity in the north of the country but the Shi'as in the south were crushed (cf. Al, 2015). The uprisings exacerbated both the Ba'ath regime's Sunni sectarianism against the Shi'as and Arab chauvinism against the Kurds.

A dilution of the Ba'athist state's formal secularism had already begun during the war against Iran. However, this trend markedly increased following the 1991 Gulf War which pitted Iraq against a US-led international coalition. The Ba'ath state adopted an explicitly religious discourse and propaganda, adding the words *Allahu Akbar* to the Iraqi flag. The Islamic mutation of the state-ideology sought to exploit the political and mobilisational potentials of the confrontation with Western Christian powers. But given the Shi'a and Kurdish uprisings it inevitably deepened sectarian tensions. Thus, the

Ba'ath regime's growing Sunni-Islamic posture strained the already fragile and superficial 'national unity'.

In this context, the economic sanctions imposed on Iraq following the Kuwait war intensified sectarianism and tribalism. This circumstance further undermined the condition of possibility of Iraq's national form. Under western sanctions Iraq's annual GDP per capita declined from \$14,178 in 1989 to \$2,982 in 1993 (Niblock, 2002: 173. cf. Alnasrawi, 2001: 214, Arnove, 2000). The severity and comprehensiveness of the sanctions regime and Iraq's loss of Soviet support severely limited the ability of the Ba'ath regime to continue its pre-war authoritarian welfare-regime as a means of manufacturing legitimacy and hence general political pacification in the manner rentier states tend to do. The *general* character of the pre-sanction 'social contract', i.e. state-provided welfare for political support or acquiescence, typical of many post-colonial authoritarian developmental states in the region (Dahi, 2011), turned into a *particularistic* system of patronage to shore up a dedicated sectarian-tribal domestic support base. The patronage was implemented through the rationings system which was itself based on detailed information on the population. Given that the overwhelming majority of the highest layers of the Ba'athist state, its multiple security organs in particular, hailed from Iraq's Sunni heartland, the Tikrit region in particular, the sanctions regime further activated sectarian and tribal relations as means of access to the state's scarce resources. This circumstance intensified the politicisation of sectarian and tribal identity, marking economic inequality with a specific communitarian colour. Paradoxically, this circumstance somewhat added to the regime's stability, for it valorised the power of the state vis-à-vis society. It also pacified popular discontent, for even many of those with high antipathy towards the Ba'ath regime were fearful of the extreme sectarian and tribal violence that was likely to follow a sudden breakdown of centralised state control (Niblock, 2002: 186, 180).

And yet the US-led war against Iraq did precisely this in 2003. Moreover, the war also placed the conflictual transformation of sectarian tension in the force-field of a wider conjuncture of ongoing neo-liberalisation of global environment and radicalisation of regional politics that culminated in the 'Arab Spring'. This conjunctural circumstance reinforced the sectarian expression of Iraqi state de-formation, aggravated the resulting conflict, and broadened the scope of geopoliticisation of sectarian and tribal identities.

Immediately following the overthrow of the Ba'ath regime and the occupation of Iraq, the US-appointed provisional authority abolished the Iraqi army and the Ba'ath party and introduced a systematic de-Ba'athification project of the government and bureaucracy. It also introduced an extreme privatisation programme. The measures completely dismantled the Iraqi state and therewith brought the Sunni political supremacy in Iraq to a sudden and violent end. The initial reaction of Iraq's Sunni-Arabs to their political and economic marginalisation was an armed insurgency that increasingly involved the indiscriminate targeting of the Shi'a population seen as the supporters of the US-led occupation forces. The American counter-insurgency strategy involved large-scale arrests, widespread torture, and collective punishment. It also increasingly relied on the Shi'a militia, which intensified Shi'a-Sunni conflict.

This context provided an exceptionally fertile ground for extremist Salafist groups. The Islamic State of Iraq (ISI), the predecessor of IS, was formed in 2006 from the merger



of a number of Al-Qaeda affiliated groups many of which had relocated to Iraq following the US war on the Taliban and *Al-Qaeda* in Afghanistan. However, the holding of the parliamentary elections and the hope of at least some sections of the Sunni population for a more favourable power-sharing arrangement through constitutional politics delayed a broad Sunni-Arab support for ISI. Power-sharing, however, did not occur. The widespread sectarianism of the main Shi'a political forces, the government of Nouri al-Maliki in particular, progressively pushed large sections of the Sunni-Arab population towards the now extremely sectarianized Sunni insurgency, which was increasingly staffed by former Ba'athist officers.

The de-facto alliance of the Ba'athists and Sunni salafi-jihadi groups or rather the absorption of the former into the latter was highly consequential for the ISI and eventually IS. Militarily and organisationally it brought crucial expertise and experience. Together they perfected methods of asymmetric warfare combining highly mobile small forces with televised acts of extreme violence and terror both of which sought to compensate for the numerical and technological inferiority of IS vis-à-vis its adversaries (Naji, 2006). Ideologically, the Ba'athists' pan-Arabism resonated with salafi territorial universalism. Modern day salafi-jihadi groups have retained the expansionist ethos of their original *wahabi* formation which the Saudi dynasty's state-formation in Arabia had eventually arrested (Al-Ibrahim, 2015). The contradiction of *wahabi* universalism and Saudi de-facto nationalism has marked the state of Saudi Arabia since its inception. For even though the Saudi tribe had managed to co-opt the clerical elites of their *wahabi* allies for the purpose of constructing a territorial state, the original idea of a universal Islamic state that marked *wahabi* movement remained alive and attractive. The Saudi state's solution to the subversive implications of this circumstance was to export it abroad. Sponsoring global radical Sunni salafi and jihadist groups by the Saudi Arabian state therefore acted both as a domestic safety valve and ideological legitimiser for a state that was the custodian of Islam's holiest places and made a claim on leading the global Muslim community. The combination of Islamic and Arab transnationalism involved in the alliance of the armed Sunni salafi groups and the Ba'athists geo-politically supercharged ISI and its subsequent iterations.

Regional interventions also exacerbated the already dire situation in post-occupation Iraq. Seeking to pre-empt the return of Sunni power in Iraq, Iran backed and manipulated Shi'a forces. On the other hand, fearing Iran's growing regional influence, Saudi Arabia and some other Arab states supported the Sunni insurgency. Meanwhile, the US 'surge' strategy and the formation of Sunni-Arab 'Awakening Councils' tribal militia put ISI on the back foot from 2006-2007 onwards. This was followed shortly by the outbreak of the 'Arab Spring' in 2010. The genealogy of the 'Arab Spring' itself is closely entangled with the international conjuncture of neoliberal dismantling of the state-led developmentalism in the Middle East and North Africa, the US 'war on terror', and the 2008 financial crisis. In Syria, the revolution was quickly transformed into armed conflict following the regime's systematic use of violence against peaceful protesters. The influx of western and regional support for the proliferating armed opposition groups and the strategic backing of Iran and Hizbullah for the Assad regime transformed the conflict into a full-fledged sectarian war. ISI seized this volatile situation and shifted its military centre of gravity to Syria and renamed itself 'The Islamic State of Iraq and Levant/Syria' (ISIL/IS) to reflect its expanded sphere of operation. But it soon clashed with other armed opposition groups, including Al-

Qaeda's Syrian branch *Jabhat al-Nusra*, over the leadership of the opposition to the extent that it was renounced by *Al-Qaeda*.

With the completion of the withdrawal of US forces from Iraq in 2011 and some military setbacks in Syria, ISI increased its operations in Iraq, seeking to secure logistical routes for its Syrian front. This led to the capture of several towns such as Ramadi and Falluja in early 2014. Meanwhile, the maximalist position of Iraq's Sunni-Arab political parties, the open sectarianism of the ruling Shi'a government, and the ambiguity of some key articles of Iraq's new constitution continued the political deadlock in Baghdad. The violent suppression of popular demonstrations in a number of Sunni-Arab areas following the formation of Maliki's third government in April 2014 dashed any remaining hope for a new Shi'a-Sunni power-sharing arrangement. This pushed considerable sections of Iraq's Sunni Arab population towards IS, which was central to the spectacular victory of ISIL's June 2014 *blitzkrieg* that led to the capture of Mosul and nearly a third of Iraqi territory, followed by the declaration of an IS-led caliphate.

## CONCLUSION

The explicitly sectarian form of the current conflict in Iraq and the wider region has provided embattled orientalist approaches a new lease of life. However, as I have shown, while the sectarian difference is of a *longue durée* character its concrete meaning and consequences are utterly historical. Moreover, the specific historical form and function of sectarian or other supra- and infra-national forms of collective identities are always products of particular forms of wider processes of interactive social reproduction. These processes and their specific outcomes are particularly amenable, both theoretically and analytically, to critical and reflexive deployments of Leon Trotsky's idea of uneven and combined development, as a Marxian form of international historical sociology, and conjunctural analysis. Mobilising this composite intellectual device, I have argued that colonial state-formation in Iraq embodied the obverse of the logic of Tsarist Russia's modernisation, Trotsky's original empirical referent. Russia's uneven and combined development involved the geopolitically animated conjunction of a pre-modern absolutist state and an advanced industrial economy. The inner contradictions of this amalgamation of the 'archaic with more contemporary forms' was the driving force of the Russian revolution which installed a socialist state in a European country with the lowest level of capitalist development.

In Iraq, the conjunction of the decline of the British Empire, the rise of *Pax Americana* and the victory of the Russian revolution with the domestic environment of an ex-Ottoman territory marked by tributary relations and Sunni dominated military and intellectual elites drove a contradictory state-formation process. This contradictory process involved the superimposition of the governing organs of a modern state upon a population organised around non-capitalist relations of personal dependency, which were reflected in the political and economic dominance of tribal landed classes. Successive attempts by post-colonial Iraqi state-classes to realign the pre-national forms of collective identity with the national form of the state were refracted through

and over-determined by regional and international dynamics (cf. Lustic, 1997). Despite contingent successes in forging certain forms and levels of national consciousness the staggered but cumulative result was the mutated reproduction and politicisation of sectarian and tribal identities.<sup>16</sup> The 2003 war and the overthrow of the Ba'athist state detonated this explosive context which had been geopolitically supercharged by two decades of war and sanctions. The socio-political explosion took place within the wider regional conjunction of the twin-crises of neo-liberalism and authoritarian state. The combined result was a full-scale sectarian war that spread from Iraq to Syria and Yemen with Kurdish regions representing an exceptional space marked by secular political practices and projects.

But beyond the case of IS this article's argument has broader implications for 'area studies' as an academic field. The original domination of the field, particularly its subfield of Middle East Studies, by orientalism and modernisation theory has long been challenged by an internally diverse and growing critical literature. Arguably however, the field is yet to decisively overcome the essentialist and Eurocentric influences of its formative period. Drawing on the theoretical arguments of this paper I suggest that this failure is symptomatic of a deeper intellectual problem in 'area studies', which has long been charged with empiricism and occupying a subordinate epistemological role consisting in gathering raw data for western dominated disciplinary social sciences (Cheah, 2008). The generative context of this problem is, I suggest, the deeper, unresolved problem of intellectual mediation between the 'general' and the 'particular', the 'scientific disciplines' and 'area studies'. Using the rise of IS as its empirical foil this paper has indicated one potentially fruitful avenue for addressing this problem by demonstrating the potentials of the theoretical perspective of uneven and combined development as a form of 'international historical sociology'. I hope that I have been able to show how a reflexive combination of a Marxist international historical sociology and conjunctural analysis when embedded in, and reworked though, the idea of uneven and combined development can avoid the twin problems of cultural particularism and Eurocentric universalism in area studies and social sciences more generally.

## NOTES

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<sup>1</sup> I would like to thank the participants of 'The Unmaking of the Middle East: Thinking Through the Crisis' workshop organised by the Middle East and North Africa Centre at Sussex (MENACS), the University of Sussex, May 9th, 2017 for their feedback on an earlier version of this paper. I am also grateful to Justin Rosenberg for many helpful comments and suggestions.

<sup>2</sup> IS is also known as the 'Islamic State of Iraq and Levant' (ISIL). In the region, the group is widely known as *Da'aesh*, which IS considers derogatory and punishes its users.

<sup>3</sup> For a fuller explanation see Matin, 2013a, 2013b

<sup>4</sup> Cockburn 2015, Weiss & Hassan 2015, and Stern & Berger 2015 are excellent book-lengths accounts of IS's emergence and evolution.

<sup>5</sup> For some representative examples see references in Gause III 2014.

<sup>6</sup> In this my argument is similar to that of Adam Hanieh (2015).

<sup>7</sup> The theoretical and analytical recognition of the fact and developmental consequences of the international is central to the argument of this paper and my other works (e.g. Matin, 2007, 2013a, 2013b, 2018).

<sup>8</sup> In adopting Anderson's definition of nation, I do not necessarily agree with his account of its historical emergence and world-wide spread (see Matin, 2013a: 76-82).

<sup>9</sup> In a heuristic sense this circumstance is comparable to what Marx (1990: 1019-1038) describes as the 'formal subsumption of labour under capital' which he contrasts with the 'real subsumption of labour under capital'.

<sup>10</sup> On sharecropping's non-capitalist production logic despite implication in world capitalist market see Al-Khafaji, 2004: 39-43

<sup>11</sup> I use this term in the specific sense of a substantively non-capitalist state's 'importation of modern industrial, technological and organizational products ... deployed primarily, though not exclusively, for military and security purposes' (Matin, 2013a: 56).

<sup>12</sup> The rivalry between pan-Arabism and Arab nationalism (or patriotic/state nationalism) has marked much of the modern history of the Arab Middle East (Milton-Edwards, 2011: 65)

<sup>13</sup> By 1980 accounted for 98% of state's foreign currency earnings and 90% of state revenues.

<sup>14</sup> This created the problem of the so-called disputed territories whose constitutional irresolution following the 2003 war has furnished the Iraqi Kurds' with part of their rationale for secession.

<sup>15</sup> For the case of the late Ba'athist Iraq see Niblock, 2002: 184

<sup>16</sup> Mamdani (1996) provides a brilliant account how colonial political economy politicised ethnicity in Africa and laid the ground for subsequent and still ongoing ethnic strife in the region.

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